SiteManager Training Manual

Module A
Chapter 1

Contract Administration
Contractor Management

Section A-1-3-1

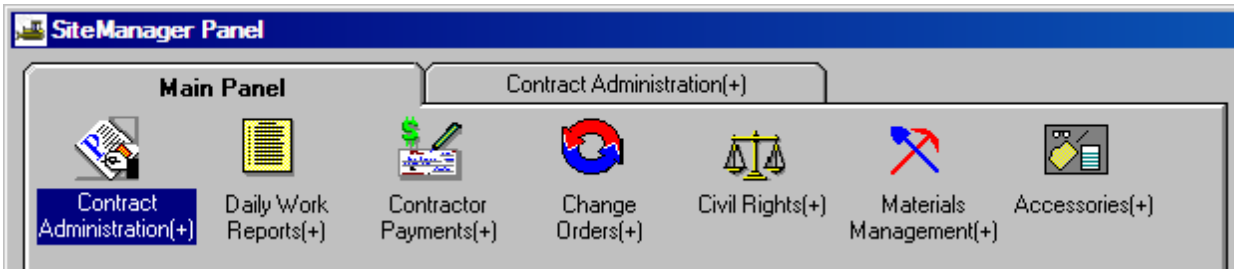
Creating Construction Conference Notes

Student's Version
Indiana Department of Transportation
October 2007, Version 3.7b

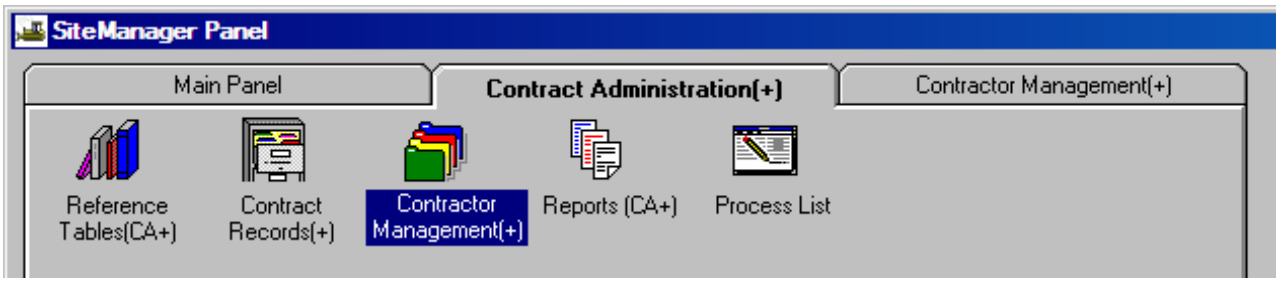
This page intentionally left blank

Creating Construction Conference Notes

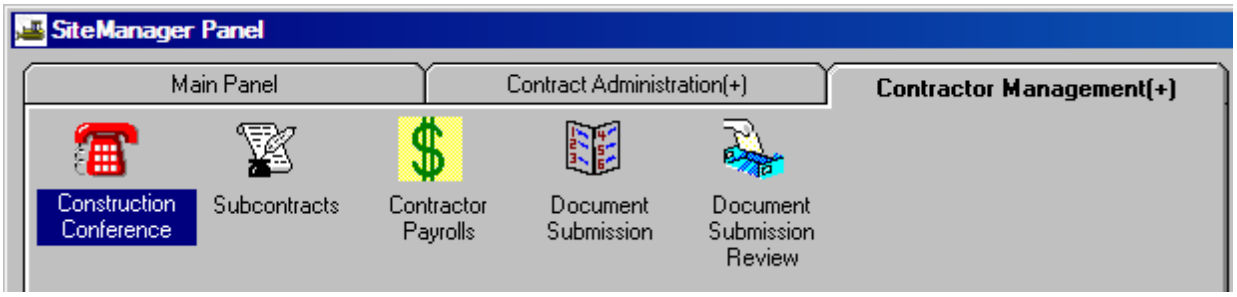
This module will explain how to track minutes of a meeting in SiteManager. And open an existing Construction Conference document.



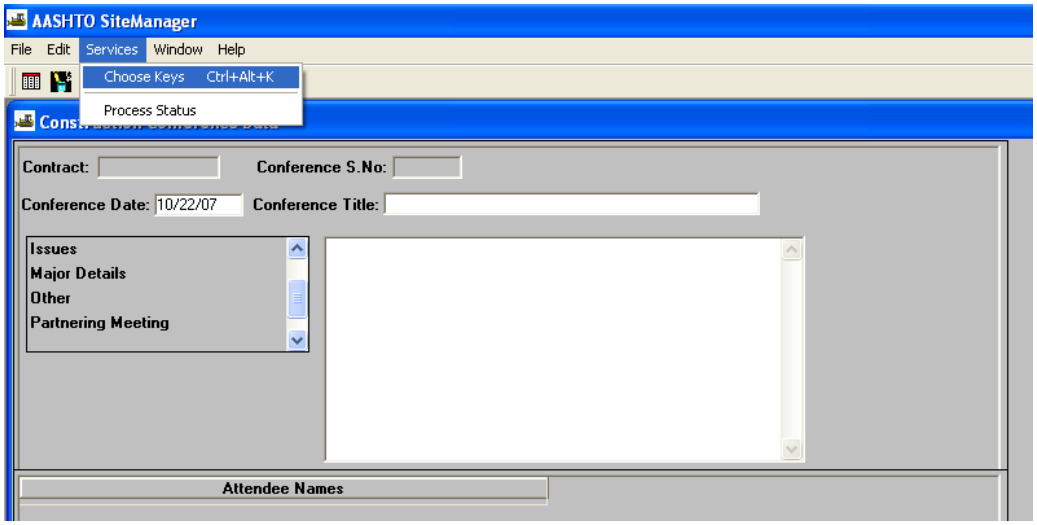
"Double-click" on **Contract Administration** located on the **Main Panel**.



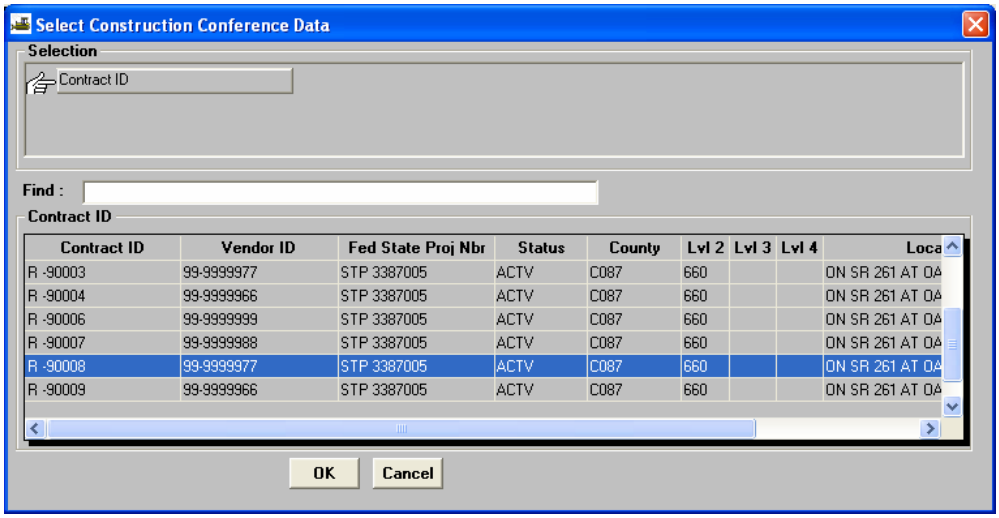
"Double-click" on **Contractor Management (+)**.



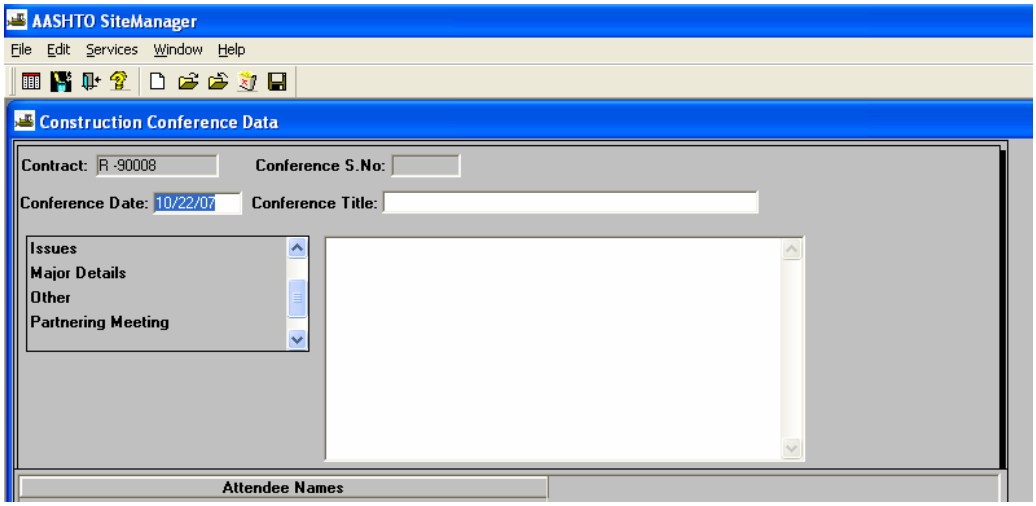
"Double-click" on **Construction Conference**.



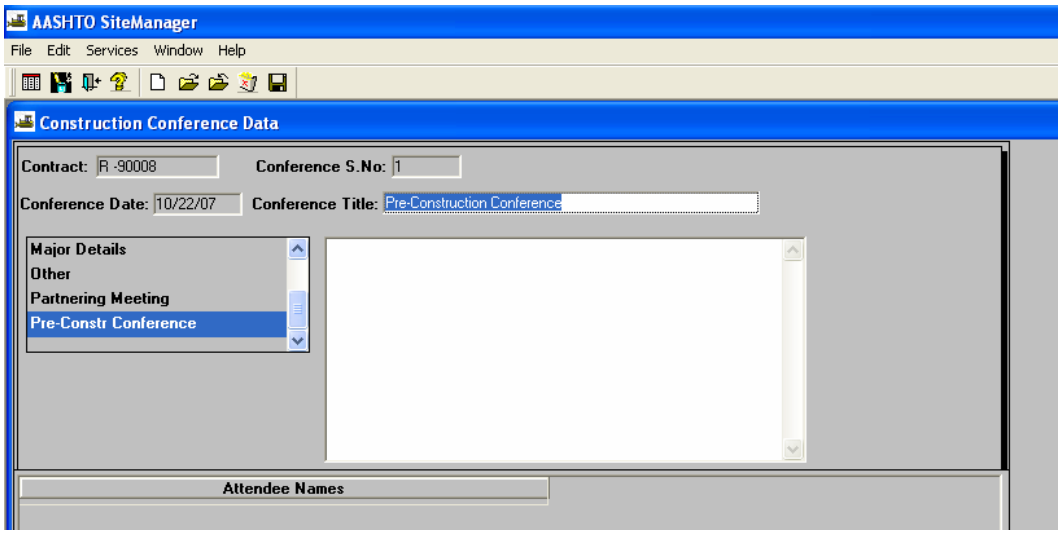
"Click" on **Services** located on the task bar, then "click" on **Choose Keys**.



"Double-click" on the appropriate **Contract ID**. If a contract is already open, this step will be skipped.

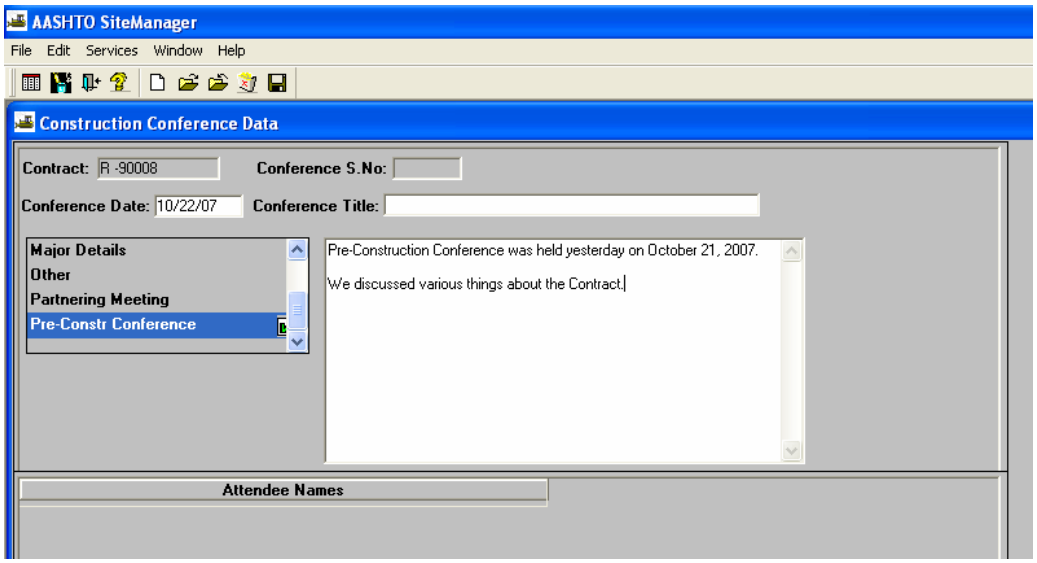


The **Conference Date** will default to the current date. If this is not the date of the conference, "enter" the correct date in this field.

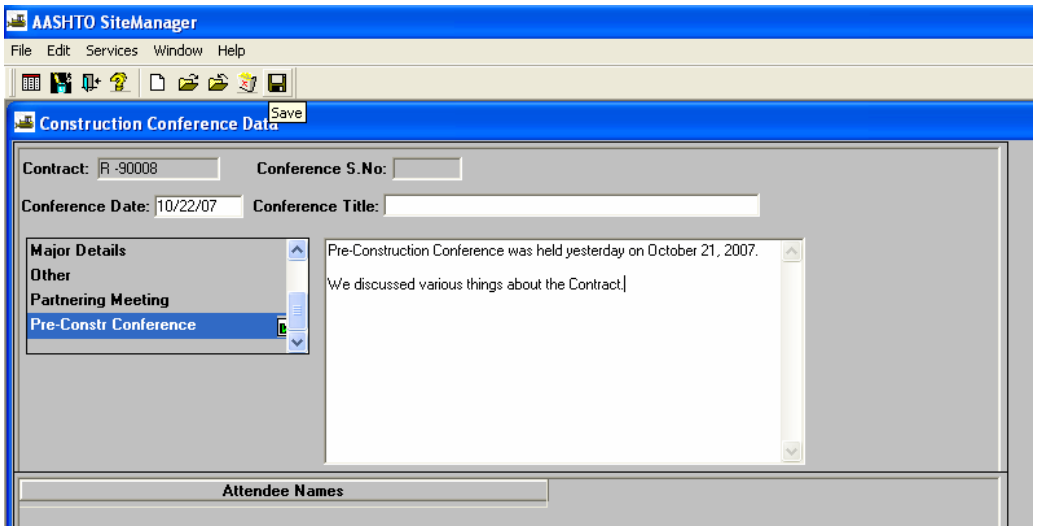


The **Conference Title:** "Click" on **Conference Title** and "enter" an appropriate title for the meeting.

"Click" on the left scroll-down box and "click" on the appropriate type of notes from the list:
Construction Conference: Construction Conference general minutes
Directives: Directives issued to the contractor
Issues: Issues that were discussed in the conference
Major Topics: Topics of the conference
Other: Other remarks
Partnering Meeting: Partnering Meeting minutes
Pre-Construction Conference- Pre-construction Conference minutes

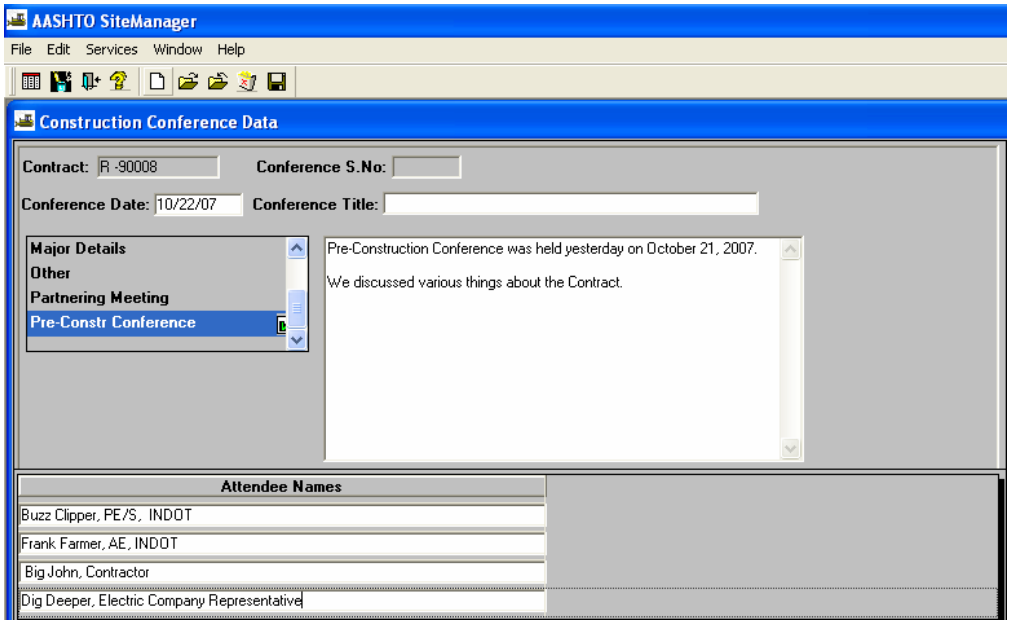


"Click" on large text box. "Enter" the minutes of the meeting in the text box. They can also be copied and pasted into the text box from another source.

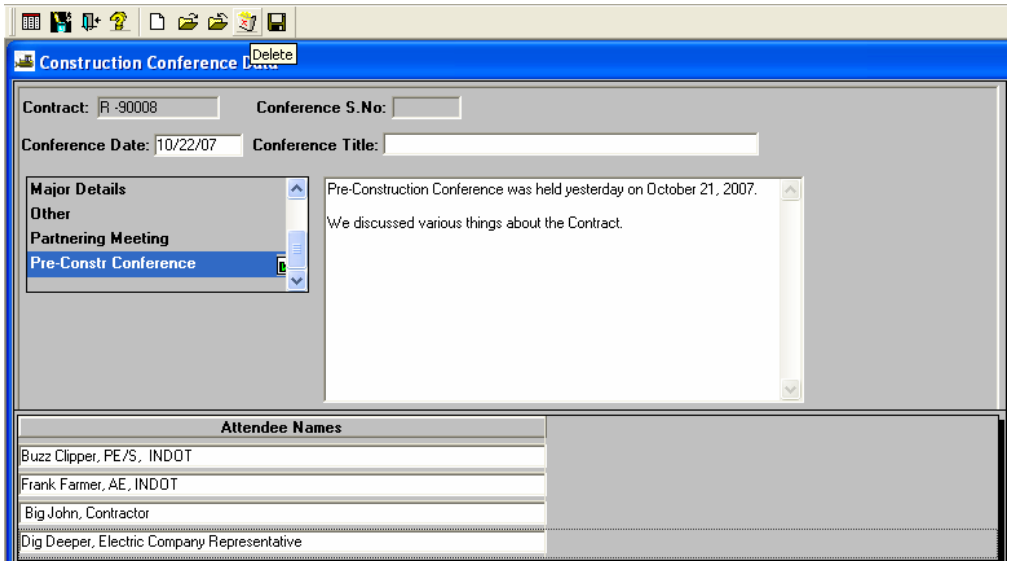


"Click" the **Save** button located on the toolbar. Notice that a green check mark appears beside the topic.

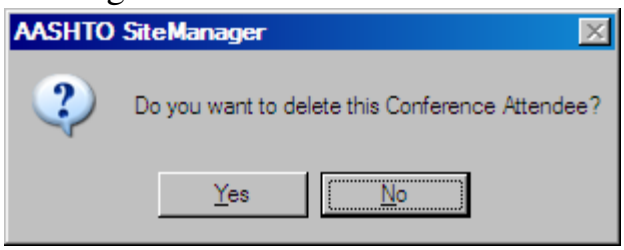
NOTE: The Conference Sequence Number (**Conference S. No.)** is automatically populated.



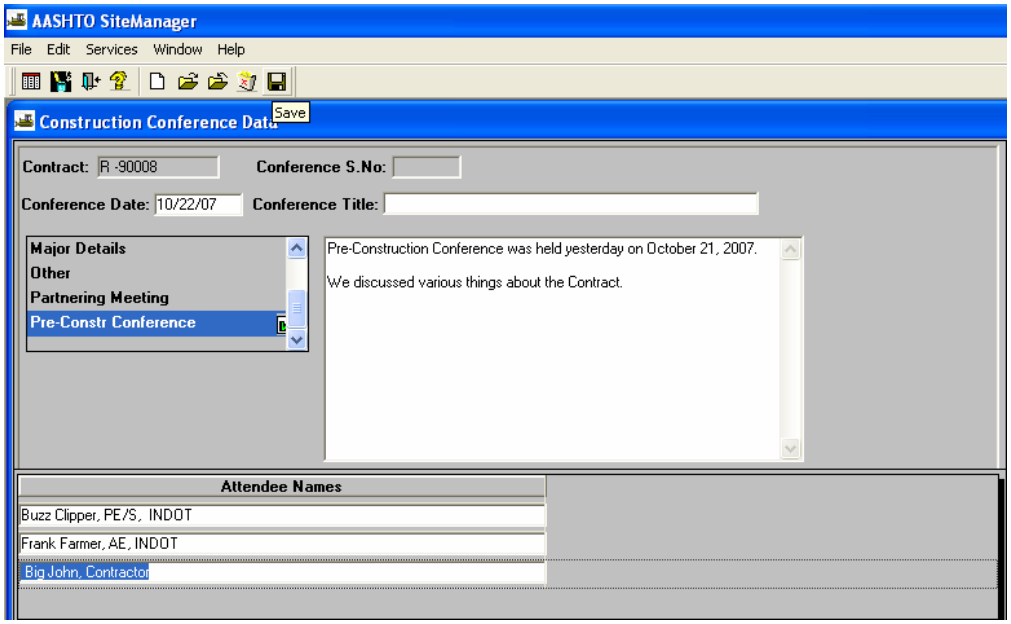
"Click" on **Attendees Names** located in the bottom panel**.**
"Click" the **New** 🗋 button located on the toolbar.
"Enter" attendee's information. After each entry you must "click" the **New** 🗋 button to enter additional attendee information.



Individual **Attendee Names** can be deleted by "clicking" on the **Attendee's Name** and clicking the **Delete** button located on the toolbar.

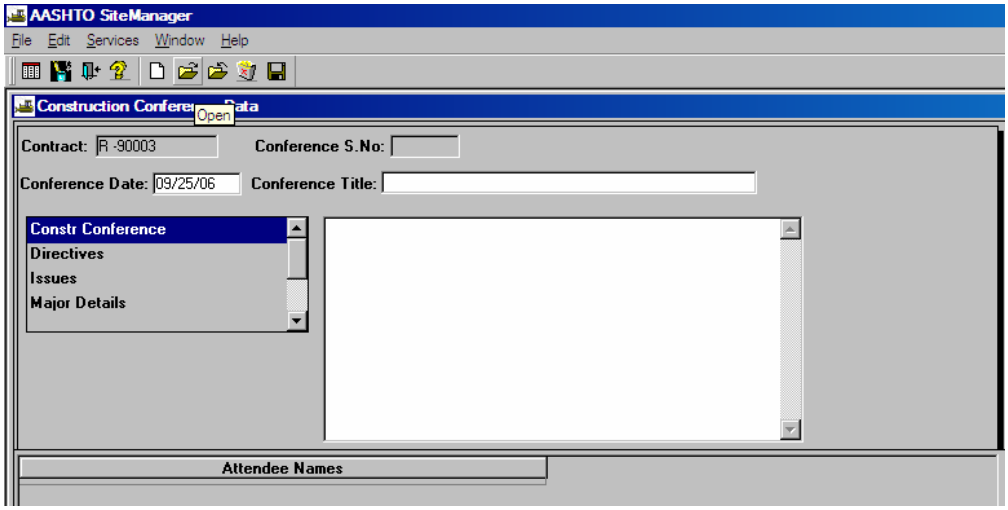


"Click" the **Yes** button to delete the name if appropriate.

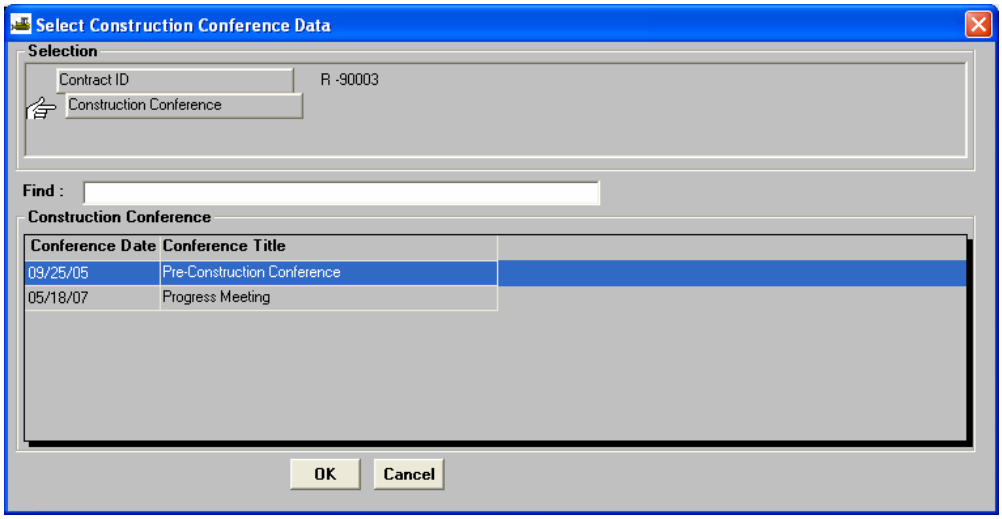


"Click" the **Save** button on the toolbar.

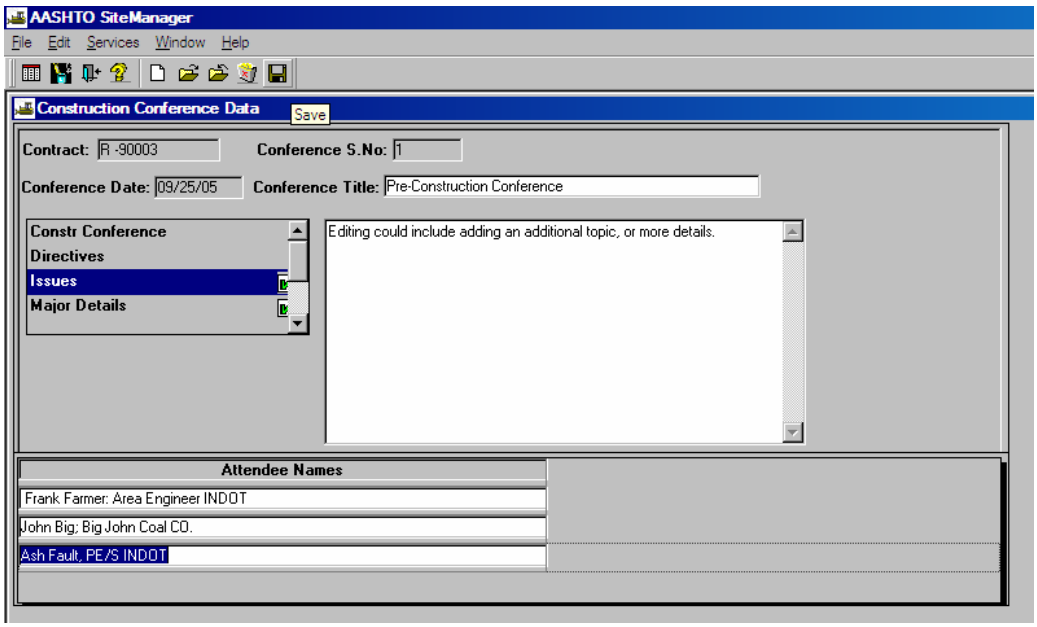
OPENING AN EXISTING DOCUMENT



"Click" the **Open** button on the toolbar.



"Double-Click" on the appropriate **Conference Title**.
Once the appropriate document is opened the document may be edited.



"Click" the **Save** button on the toolbar.

"Click" the **Close** button on the toolbar to exit.

Creating Construction Conference Notes

Exercise A-1-3-1-T
Group Exercise

Create a set of Construction Conference Notes for a Pre-Construction Conference.

Log into SiteManager as d90afaul
Password pass
Log in as **PE/S**

Navigate from the **Main Panel**:
"Double-Click" on **Contract Administration (+)** icon
"Double-Click" on **Contractor Management (+)** icon
"Double-Click" on **Construction Conference** icon
"Click" on **Services** on the Windows Menu Bar
"Click" on **Choose Keys** on the scroll down menu
"Double-Click" on the appropriate **Contract ID** from the selection panel R90009
Enter the **Conference Date** in the appropriate field mm/dd/yy format
"Click" on the **Left Scroll Down Menu**
"Click" on the type of **Conference Notes** to be entered Construction Conference
"Click" on **Conference Title** and enter brief Title for the meeting or conference Pre-Construction
"Click" in the **Large Text Box** and Enter the minutes of the meeting or copy and paste document from another type: This space for minutes
"Click" the **Save** button on the Toolbar

"Click" on **Attendees Names** located on the bottom panel
"Click" on the **New** button on the Toolbar
Enter **Attendees** information in the blank space Frank Farmer; INDOT Area Engineer
Enter additional Attendees by 'clicking" on the **New** button for each one
"Click" on the **Save** button on the Toolbar

"Click" on **Close** located on the Toolbar